

Please use this form only to transfer assets held in your brokerage accounts outside Raymond James.

All owners of the brokerage account and donors to the Raymond James Charitable Endowment Fund must sign this form. Each signature must be guaranteed by a bank or securities broker.

Mail the original and your completed Donor Account Application to the Raymond James Charitable Endowment Fund.

Name of broker, custodian, or trust officer

Brokerage/custody account number

Name of broker's financial institution

Financial institution's transfer agent

Broker, custodian, or trust officer's phone number

Transfer agent's phone number

AS MY/OUR IRREVOCABLE GIFT TO THE RAYMOND JAMES CHARITABLE ENDOWMENT FUND, PLEASE TRANSFER THE CASH OR SECURITIES LISTED BELOW TO THE RAYMOND JAMES CHARITABLE ENDOWMENT FUND PURSUANT TO THE ATTACHED DELIVERY INSTRUCTIONS.

Number of shares, principal amount of bond or cash amount	Name of security issuer	Symbol	Maturity date of bond
1. _____	_____	_____	_____
2. _____	_____	_____	_____
3. _____	_____	_____	_____
4. _____	_____	_____	_____
5. _____	_____	_____	_____

Date

Signature Guarantee

Signature of donor and account owner

(stamp)

Please print name

Bank or broker name

Signature of co-donor and co-account owner

Officer's signature

Please print name

Title

Raymond James Charitable Endowment Fund • P.O. Box 14407, St. Petersburg, FL 33733-4407
Phone: 866-OUR-FUND (687-3863) Fax: 727-567-8040 • www.MyFamilyFoundation.org

Registration # CH11828

A COPY OF THE OFFICIAL REGISTRATION AND FINANCIAL INFORMATION MAY BE OBTAINED FROM THE DIVISION OF CONSUMER SERVICES BY CALLING TOLL-FREE (800-435-7352) WITHIN THE STATE. REGISTRATION DOES NOT IMPLY ENDORSEMENT, APPROVAL, OR RECOMMENDATION BY THE STATE